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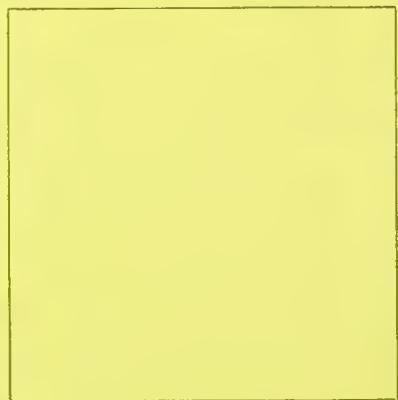
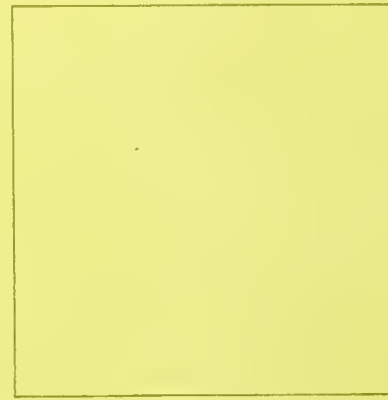
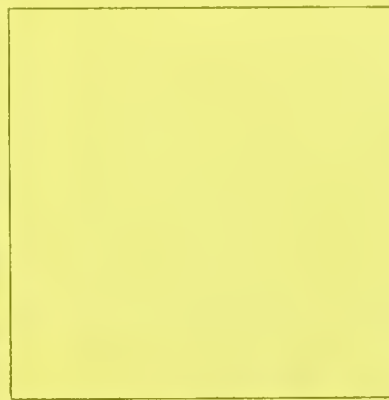
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# MARYLAND GUIDELINES FOR LOCAL RECREATION PLANNING



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MARVIN MANDEL  
GOVERNOR

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VLADIMIR A. WAHBE  
SECRETARY OF STATE PLANNING  
MADELINE L. SCHUSTER  
DEPUTY SECRETARY

November 22, 1974

The Honorable Marvin Mandel  
Governor of Maryland  
The State House  
Annapolis, Maryland 21401

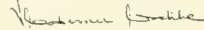
Dear Governor Mandel:

I am pleased to transmit to you the following publication entitled "Guidelines for Local Recreation Planning".

This document, prepared by the Department in cooperation with the Department of Natural Resources, is a logical outgrowth of the Maryland Open Space and Outdoor Recreation Plan. It is intended primarily for those representatives at the local level of government who are responsible for the provision of outdoor recreation and open space opportunities but require additional skills and guidance to meet local needs.

At the same time, this document will also provide another means by which the State and its citizens can sharpen their planning skills and implement the goals and objectives outlined in the State Outdoor Recreation Plan.

Sincerely,

  
Vladimir A. Wahbe

## **The State of Maryland**

Honorable Marvin Mandel, Governor

## **Maryland Department of State Planning**

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Madeline L. Schuster, Deputy Secretary

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October, 1974

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# **MARYLAND GUIDELINES FOR LOCAL RECREATION PLANNING**

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# Introduction

Maryland has adopted an Outdoor Recreation and Open Space Plan to meet growing needs for open space and outdoor recreation throughout the State and to help preserve and restore the natural resources on which we all depend for survival. Recognizing that funds are limited and suitable areas rapidly disappearing, Governor Mandel directed the Department of State Planning to develop overall Statewide guidelines to ensure the best possible use of our natural resources for recreation and conservation.

A "Concept Plan" was published in 1971, outlining preliminary statewide policies to guide the State, other governmental agencies and private enterprise in the provision of open space and outdoor recreation areas. For that purpose, Maryland was divided into six regions, each with its own characteristics and particular problems: Western Maryland; Baltimore; Suburban Washington; Southern Maryland; Upper Eastern Shore and Lower Eastern Shore.

Using the Concept Plan as a basis for discussion, the Maryland Department of State Planning and its consultant, Urban Research and Development Corporation, in cooperation with the Maryland Department of Natural Resources, met with the local agencies and citizens' groups within each of these regions, and with various State departments. These meetings provided a basis for more detailed planning and some adjustments in policies.

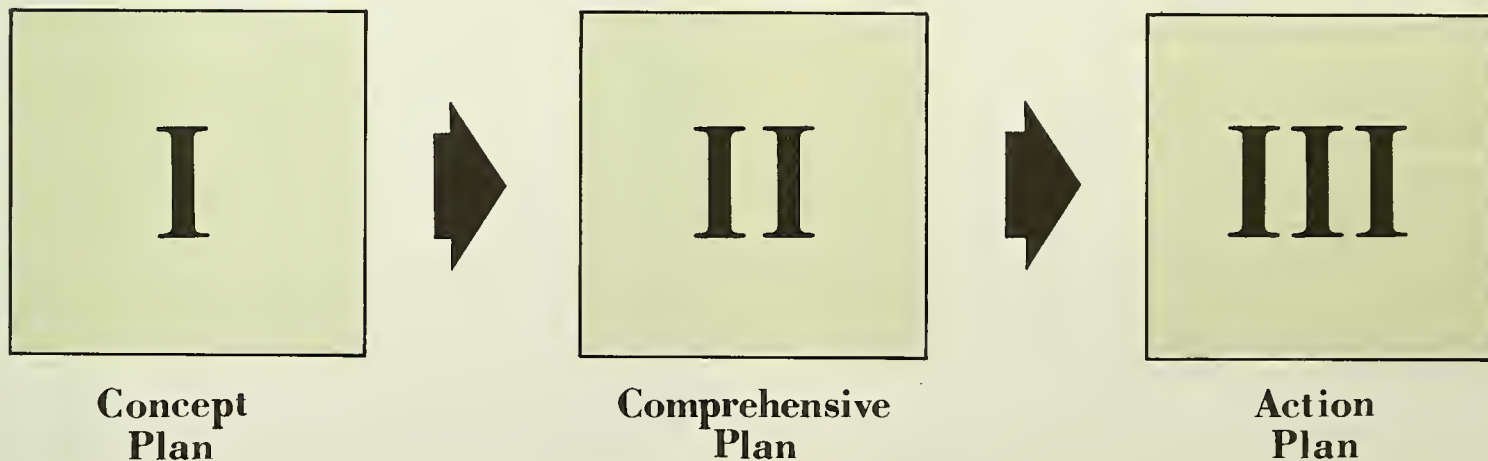
The next step was the "Comprehensive Plan", issued in 1972 by

the Department of State Planning. This refined and expanded the goals and policies of the Concept Plan. The third stage, the "Action Plan", provides a detailed overall program for outdoor recreation and open space planning, property acquisition and development. It also includes recommendations for high-priority recreation areas.

"Open space" refers to areas without intensive residential, commercial and industrial development although they may not be equipped for "recreation" purposes. Open areas, especially in cities, relieve the monotony of buildings and help create a pleasing environment. Although they may be used as cemeteries, historic sites and reservoirs rather than parks, open spaces are a recreation resource.

The State's Plan serves as a general guideline for both state and local government planning, acquisition and development of open space and recreation. It has been worked out in consultation with many people all over the State, and is sensitive to regional, county and municipal needs. Its purpose is to create better understanding and easier working relationships between the State, local governments and private enterprise. Its ultimate objective is more recreation opportunities, a better environment, and more effective use of public and private funds.

## Maryland Outdoor Recreation and Open Space Plan



In the three years since Maryland published Phase I, the Concept Plan for Outdoor Recreation and Open Space, more than 12,000 acres of vital recreation and open space lands and waters have become available to the public. These properties, acquired with Federal, State and local funds, have been coordinated with the recommendations of the overall Plan. Maryland is on the way toward turning its Plan into reality.

Through local efforts, backed by the State government, improved recreation facilities and designated open spaces will make your community a more attractive place in which to live. That is why *Guidelines for Local Recreation Planning* is being published by the Maryland Department of State Planning. It is a working tool for the local government official, elected or appointed, and for the volunteer who finds himself responsible for the parks and recreation needs of his county or municipality.

Recreation is one of the most important services local government can offer its constituents, because local government is in the best possible position to understand what the people in the community want. Although the State can provide parks and other facilities serving broader areas, only local government can provide neighborhood facilities primarily designed for its residents. Most families in a community will not drive long distances on weekends to state parks, but will use facilities close at hand, often on a daily basis. They will know who is responsible for providing these neighborhood facilities, which can do much to improve the quality of the community.

Recreation is often neglected at the local government level. Although it should be obvious that recreation must be carefully planned if it is going to meet the needs of the entire community, too often recreation planning receives less emphasis than planning for police and fire protection, public works, sanitation and water supply.

The **Guidelines** will assist in meeting the community's needs for open space and recreation, recognizing that you and your associates may not be experts on the subject.

To begin with, then, what is recreation? What is planning? Why do we need them?

Recreation is the satisfaction you receive from voluntarily taking part in any kind of activity. Because most people derive this satisfaction from a change of pace, getting away from the job, recreation is of course usually defined as what we do in our leisure time. Much of this recreation takes place out in the open, using land, water, and other natural resources.

Today there are more people earning more money in less time than ever before. Spending power and free time are on the increase. Maryland's population is growing, and young adults with growing families are an increasing part of that population. Yet the middle-age and older-age groups are also important segments of the population, and their recreation needs differ from the needs of young families. So a successful community recreation program must provide a wide range of leisure time opportunities. The natural resources of our State, which can provide for most of these recreation needs, are becoming less available as residential, commercial, and industrial areas expand.

What is planning? In general, it involves the gathering and analysis of data, an evaluation of the present situations revealed by the findings, and then a look into the future by formulating a course of action.

Many counties and municipalities in Maryland already have a comprehensive development plan, or are preparing such a plan. Every County government and many municipalities have an agency of some kind, either a line department or a board or commission, which has the responsibility of planning on an overall basis for the entire community. The comprehensive plan shows how the land within the local government boundaries may best be developed for residential, farm, commercial and industrial use, for schools and other institutions, streets and highways, and utilities.

Planning for recreation is one element in a comprehensive plan which is based on careful study of community needs. What should a recreation and park study consist of? Who should prepare it? Then, how should its recommendations be carried out? Finally, how can a recreation and park program be financed and staffed?

These are the questions which *Guidelines for Local Recreation Planning* is designed to answer. The **Guidelines** point out the items which ought to be included in a recreation plan to meet eligibility requirements for State assistance programs. Also, the **Guidelines** encourage plan compatibility from one jurisdiction to the next, and thus will facilitate cooperation among local governments.

## BACKGROUND AND ORGANIZATION -- FACING THE PRESENT AND FUTURE

As we have pointed out, Maryland's population is growing and its natural resources available for recreation are declining.

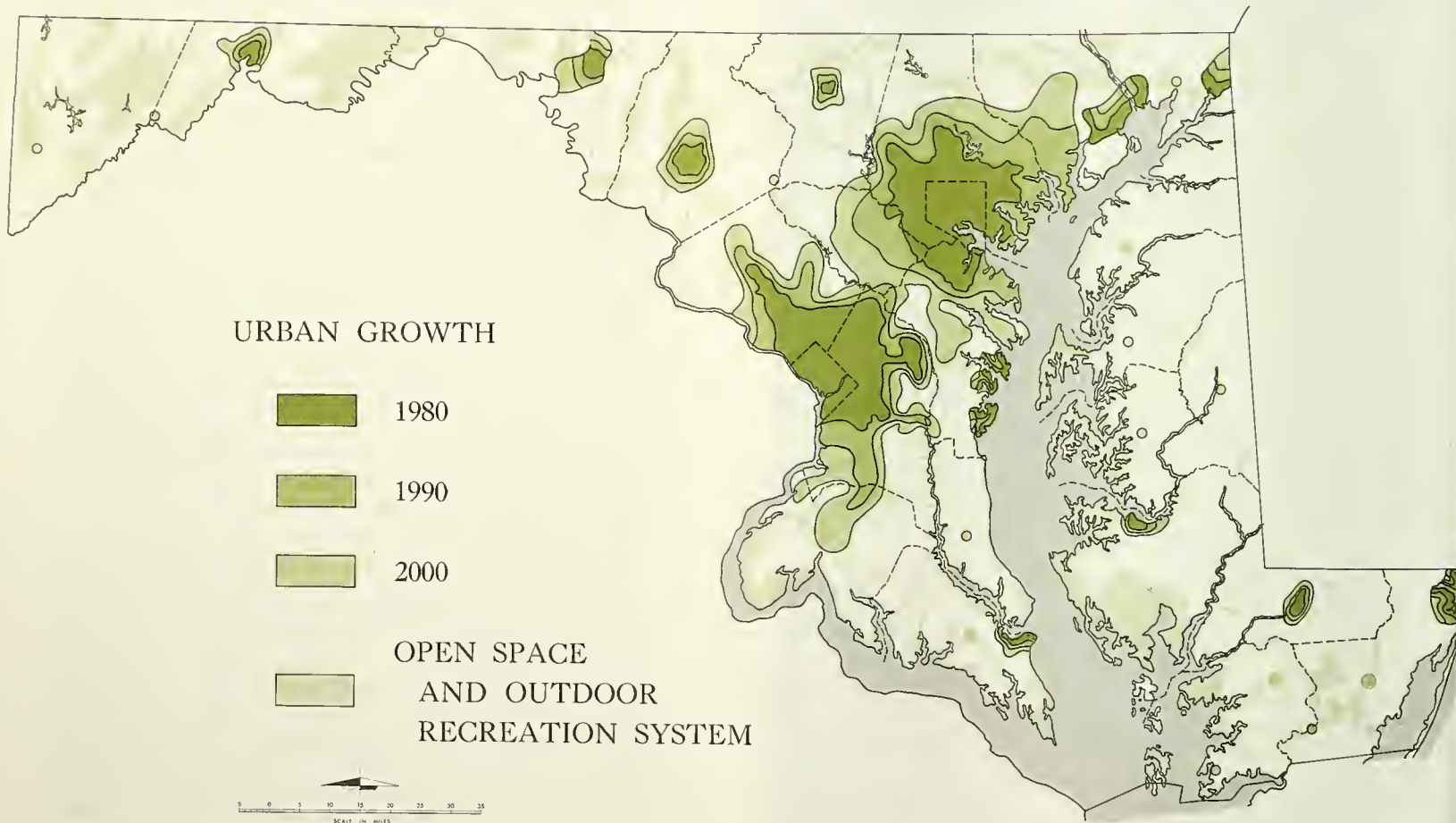
Maryland's population will be more than six million by the year 2000 -- two million more people than live in the State today. About 80 percent of us will be living in metropolitan Baltimore and Suburban Washington regions. Because of the rapid increase in automobile ownership and in expressways and improved highways, our people are more mobile than they used to be. They have more money to spend, and more leisure time. Putting all these factors together, the Department of State Planning estimates that users of public recreation facilities in Maryland (mostly outdoor facilities) will **nearly triple** between now and the year 2000. In other words, within less than 30 years there will be three times as many visits to public recreation facilities in Maryland every year as there are now. The State and local government will have to play a larger role in providing capacity to meet this demand.

Although the State has major plans for expansion, as a review of the Action Plan will indicate, counties, municipalities, and private enterprise will have to help meet the citizens' needs for recreation. This is a great challenge. At the same time, it is also a great opportunity for progress.

What kind of recreational facilities will people want, and where will they want them to be located? The Department of State Planning expects demand for every type of outdoor recreation to increase. It expects that by far the greatest demand, in terms of number of users, will be for facilities in or near the Baltimore and Suburban Washington regions. In addition, extensive recreation demands are found in all urbanized areas throughout the State.

The resources of our State are available to meet this demand if we plan ahead: including the vast Chesapeake Bay, stream valleys, mountainous areas, scenic rivers and shorelines. Easy access to these areas and protection against their misuse will make possible their future use and enjoyment.

# URBAN GROWTH AND HIGH PRIORITY RECREATION AREAS



Source — Maryland Outdoor Recreation and Open Space Concept Plan

## Organizing for Recreation

Where does the county or municipal official fit in?

As a general rule, State and Federal recreation facilities are not established to meet strictly local recreation needs. Thus, the role of local government in outdoor recreation is to provide for these local needs, using financial assistance if necessary and available. The local government has a responsibility to the people in its area, and an opportunity to serve them in a way that will create a better and more attractive community. To meet recreation needs, there must first be enthusiasm, dedication and careful thinking on the part of public officials and private citizens. The community will, of course, have to draw upon local revenues, and it can benefit greatly from private gifts, user fees, and concession income. Also, provided that careful planning procedures are followed, it will qualify for grants of State and Federal funds.

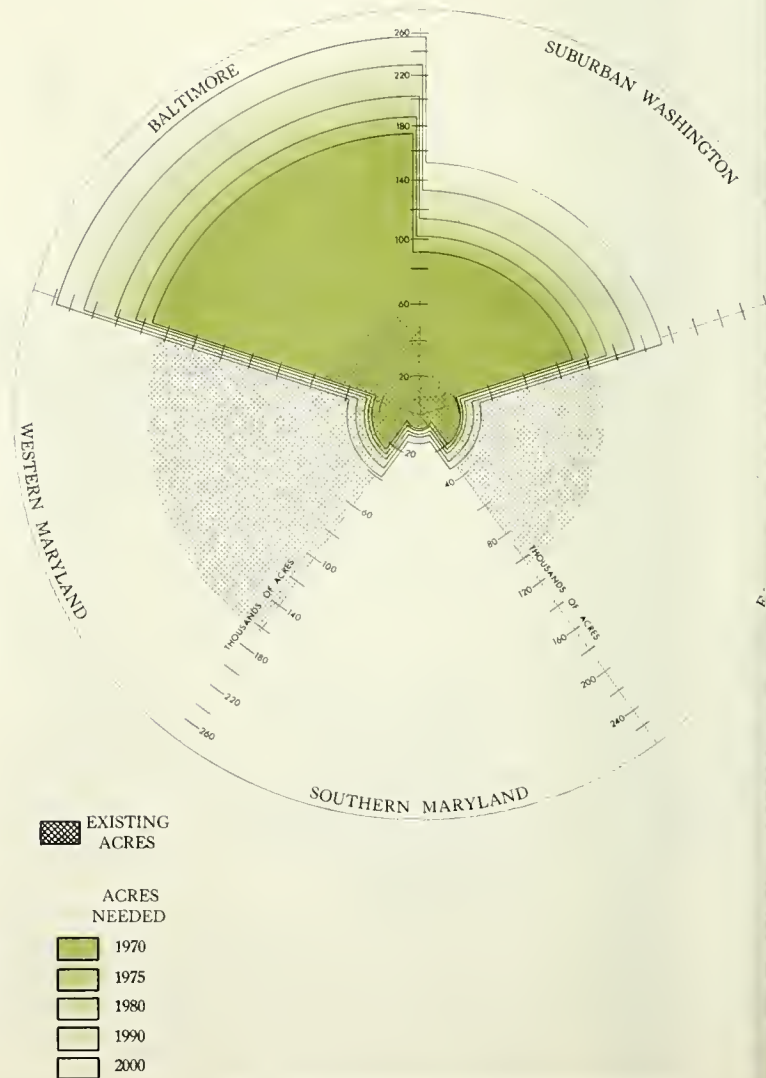
**County** - Your county may already have a park and recreation board or commission. Many Maryland counties have established such agencies, many of which are well equipped to do an excellent job, and it is essential that the other counties follow suit, to ensure a balance of local recreation programs and facilities throughout the State.

County park and recreation agencies provide for acquisition, development, programming, and maintenance of a wide variety of facilities, ranging from neighborhood tot lots and playgrounds to regional parks. Within each county a liaison officer has been appointed to serve as a contact for all park acquisition and development applications for State and Federal assistance.

The State Outdoor Recreation and Open Space Plan suggests that county recreation agencies:

- Protect unique natural areas designated in the State Plan, through direct acquisition, easements, or other means.
- Work with the county planning agency to develop a recreation element in the county comprehensive plan. This recreation element should also be compatible with the State Outdoor Recreation and Open Space Plan.
- Work with the county planning agency to use conservation zoning as a means of protecting areas unsuitable for intensive development, such as marshland, flood plains, rugged terrain, areas of poor drainage.
- Work with the county planning agency to give full consideration to cluster subdivision, planned unit development and new town zoning provisions which have mandatory land dedication for open space and recreation development.
- Develop and submit to the Departments of State Planning and Natural Resources acquisition and development schedule, to be updated annually, for all open space and outdoor recreation projects. By December 1 of each year, submit the "annual capital program" for the upcoming year to appropriate State agencies.
- Protect and enhance historic sites and areas.
- Explore the feasibility of establishing regional park and recreation commissions (including two or more counties), or local jurisdictions (if not already in existence) a county park and recreation commission, to plan, program, design and develop outdoor recreation resources.
- Develop and maintain outdoor recreation areas with facilities and programs extending beyond the capabilities of small incorporated municipalities, but designed primarily for local residents. In some areas the county is responsible for both county-wide and local recreation areas.
- Encourage private development of recreation facilities by helping developers to identify recreation demand and need, by creating more equitable and reasonable zoning measures for private recreation, by acquiring land in advance and making it available for private recreation development, and by exploring new and innovative ways to create mutually beneficial county/private recreational partnerships for acquisition, development and management.
- Explore with the county board of education the possibilities of using school buildings and adjacent land on a joint basis for neighborhood recreation facilities. This can be done effectively at a considerable saving, as has been demonstrated by Baltimore County.

## OPEN SPACE AND OUTDOOR RECREATION NEEDS



**Municipal** - While county recreation facilities are primarily designed to serve the county-wide area, the municipal role is to provide and manage well-equipped facilities at sites within easy reach of residents of the municipality. Two-thirds of Maryland's population lives in metropolitan areas and needs recreation facilities which are close to them. In addition to a recreation program coordinated with boards of education, using local school buildings and adjacent land at savings in cost, municipalities should think in terms of developing a system of tot lots and playgrounds, neighborhood parks and community-wide parks.

The State Outdoor Recreation and Open Space Plan recommends that municipal recreation agencies:

- Work closely with the municipal planning agency to develop a program for recreation and open-space preservation that would be on a par with programs for public works and public safety, and fit into the comprehensive plan for the municipality.
- Keep in touch with the county liaison officer and the county planning agency, to be sure that the municipal comprehensive plan and its recreation plan conform to the county comprehensive plan and its recreation plan.
- Working through the county liaison officer, develop and submit to the Departments of State Planning and Natural Resources acquisition and development schedule. By

December 1 of each year, submit "annual capital program" for the upcoming year to appropriate State agencies, through the county liaison officer.

- Use urban renewal, cluster development and zoning controls to set aside areas for parks, plazas and malls.
- If not already established, explore the feasibility of setting up a park and recreation board to plan, program, design and develop outdoor recreation resources, cooperating with the county recreation agency.
- Protect unique natural areas designated in the State Plan.
- Protect and enhance historic sites to create local scenic and educational interest.
- Explore the possibility of a joint program with other municipalities and the county.

**Private** - Private enterprise and civic organizations and clubs will engage more and more in the recreation business as incomes rise, and leisure time increases. This calls for closer cooperation between Federal, State and local government and private enterprise to develop specialized facilities such as ski areas, camp grounds, marinas, golf clubs, swim clubs, and sports centers, in a harmonious and complementary manner which will not duplicate public facilities. The State's Plan can be helpful here to identify sites for facilities that will preserve the environment.

## CURRENT AND PROJECTED OUTDOOR RECREATION NEEDS

The graph indicates the disparity that now exists between the location of people and the location of open space and outdoor recreation areas in Maryland. Western Maryland and the Eastern Shore, two sparsely populated regions, have the most land devoted to open space and outdoor recreation purposes. Yet the Baltimore and Suburban Washington Regions have the least amount. Southern Maryland presently has an acceptable ratio of open space and recreation areas to people.

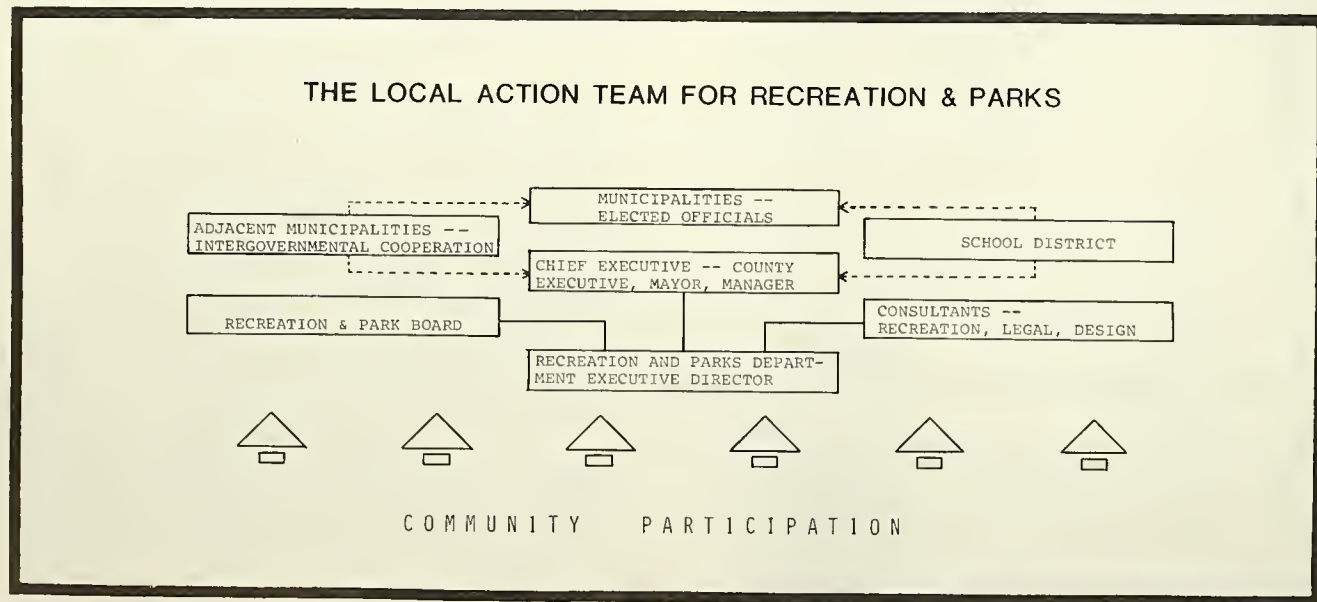
# Community Support

It must be emphasized that the success of an open space program in a community depends on widespread community support and a permanent organization. If the community does not already have a board or commission for parks and recreation, you should start by gathering a local action team, representing those community agencies and officials who would naturally be interested, along with public-spirited individuals.

It is essential that your board or local action team work closely with the local planning agency that is charged with the responsibility of preparing the comprehensive plan for your community. The team would not spend time, for example, selecting a site for a neighborhood park that the planning agency has designated to be traversed by a new highway. Your group should rely on the planning agency to provide various alternative sites for recreation facilities. It could then proceed to make a final selection. The schematic design on this page indicates how the planning agency and recreation agency might work together through the various stages of recreation planning, site acquisition, site development, and programming.

The local action team should include: the Mayor or other chief administrator (or his representative); members of the board of county commissioners, city council or other legislative body; a representative of the local planning agency; the school superintendent or school principal, as appropriate, or his representative; members of the school board; leaders of local civic organizations such as the Chamber of Commerce, Scouts, Rotary and other service groups, including women's organizations and conservation groups; union leaders; officials of other municipal agencies who may have some interest in parks and recreation, such as the head of the public works department, city engineer, and city solicitor. Also the team should include public-spirited individuals whose interest will be obvious to you. It is important to have a "balanced" group representing as many different elements of the community as possible -- geographic neighborhoods, economic levels, racial groups, church leaders, union leaders, businessmen, and any other community group that shows an interest.

Since, depending on the size of a community, this might involve quite a few people, an advisory committee or special neighborhood councils may be needed in order to keep the main committee from getting too unwieldy.



If the community already has a board or commission for recreation, you should review its structure and its membership to see if its role can be expanded or improved upon. Are the present members in touch with the community? Are they familiar with youth problems, and the situation in the schools? Are they representative of powerful community organizations? Can they spend more time working for the community?

If a community already has a line department in the municipal government structure, responsible for parks and recreation, it may be helpful to supplement it with an appointed board representing the community. Depending on local circumstances, this board could take a major hand in setting policies or serve in an advisory capacity. In any event, it can be effective in marshalling community support for the program.

The most important things to keep in mind are:

- The more people involved in planning and carrying out a program, the more successful it will be.
- There must be a permanent organization charged with responsibility for recreation, in order to keep following up on the plan.
- Volunteers are extremely important, in many ways. For example, some local recreation councils raise private funds to help pay for programs.

## Legal Authority

Maryland law gives the county or municipality ample authority to establish a permanent recreation agency with power to act.

Article 66C, Section 410 of the Annotated Code of Maryland authorized all counties and municipal corporations to establish, maintain, and conduct a comprehensive program of public recreation and parks for their citizens. The governing body (board of county commissioners, county council, mayor and city council, or however designated) may provide such services by creating a special board or department, or by designating an existing department, board or commission or combination of such agencies.

This agency may employ personnel as authorized by the governing body and may organize volunteer citizens groups or councils.

Through its designated agency, the governing body may, of course, use for recreation purposes any water, land, buildings or other improvements which it owns or leases. It may also acquire or lease additional property-- within or outside its boundaries. It may issue bonds to acquire or improve property or equipment for such purposes. If it already has powers of condemnation through other provisions of law, it may condemn property for recreation uses.

The local government may provide for operations, programs, equipment, and maintenance out of its general funds or from any available designated funds. It may accept gifts of property or money for recreation purposes and may charge user fees when appropriate.

The recreation agency, if authorized by its governing body, may join or cooperate with the Federal government, the State of Maryland, other local governments, county boards of education, designated recreation agencies of local government, and community recreation councils in acquiring, leasing, providing, establishing, maintaining and conducting recreation and park areas, facilities and activities.

Additional legal authority is provided through other Maryland laws, county charters (when counties have adopted such charter), and city ordinances. Local government attorneys should be consulted for further information.

## Completing Your Local Organization

If the community does not already have a permanent agency for recreation, the local action team should proceed to develop a recreation and park plan. It will be based on the community's comprehensive plan. The two types of plans will be fully described in the next section. In the course of preparing a recreation plan the team will have to determine whether the community needs a separate agency, whether an existing agency can be assigned this function in addition to other duties.

The membership of a county recreation and park board or commission must include one member of the county governing body and one member or designated representative of the county board of education.



# CHAPTER II

## PLANNING for RECREATION

The first step of the local action team, existing recreation board, or municipal department working with a community-wide committee is to work closely with the agency responsible for preparing the community's comprehensive plan.

### Comprehensive Plan

The community should have already prepared, or be preparing, its comprehensive plan. This is the responsibility of the local planning agency. What is a comprehensive plan?

A comprehensive plan is an inventory of the present natural and human resources of a community, an analysis of how they relate to each other, and a set of recommendations as to how these resources can best be used in the future so that the people in the community can live and work under the best possible conditions.

A comprehensive plan provides the major facts about a community as it is today. It estimates future population growth and provides a step-by-step program to meet the needs of that future population. It provides a framework within which future decisions can be made by public agencies, businesses, and private individuals in ways that are consistent with the best interests of the community as a whole.

The comprehensive plan identifies the land and water areas suitable for recreation use, as part of its overall analysis of the appropriate use of all land and water within your local government's jurisdiction. As an additional step, it may go further and develop more detailed plans for each district or neighborhood within the jurisdiction.

Here is an outline of a typical comprehensive plan. Such plans are organized in different ways, with varying emphases, depending on circumstances. This outline, however, includes the topics generally studied by the planning agency. Where it relates to recreation, the comprehensive plan should be prepared in cooperation with the recreation agency or local action team.

# Comprehensive Plan Outline

## INTRODUCTION AND BACKGROUND

Brief history of the community  
Government structure -- including  
relation to public school system  
(chart)  
Neighborhoods and social groups (map)

(these are the  
"political" charac-  
teristics with which  
the planners will  
work)

## NATURAL RESOURCES

Physiography (maps)  
stream valleys, ridges, other  
significant land forms  
drainage  
woodlands and vegetation  
geology and soils  
Agricultural products  
Mineral resources

(these are the ele-  
ments of the environ-  
ment which will have  
positive or negative  
effects on future  
activities of local  
residents)

## HUMAN RESOURCES (tables)

Population by decades since 1920  
(white and negro), including  
estimated present population  
Population distribution by agri-  
cultural, rural nonfarm, urban  
Relative growth of rural and urban  
population, 1930-1970  
Population distribution by age, sex,  
family size, marital status  
Forecast of future population, by  
components  
School enrollment by decades and for  
current year, by grades  
Forecast of future school enrollment  
by grades  
When appropriate, number of people in  
physically handicapped groups,  
economically disadvantaged groups,  
school drop-outs and institutional-  
ized persons  
Employment by decades and current  
year -- agricultural, commercial,  
industrial

(these are the charac-  
teristics of the people.  
What kinds are they  
now, and what kinds  
are they likely to be in  
future? What are  
likely to be their  
future needs?)

Forecast of future employment by com-  
ponents  
Level of education and income --  
present and forecast

## PRESENT LAND USE, (Maps & Text)

Transportation & Community Facilities  
Rural  
Urban  
Residential -- types by major distri-  
bution  
Commercial  
Industrial  
Institutional -- including recreation  
facilities, public and private  
Major streets and highways  
Open-space areas  
Utilities

(this is a summary  
of the uses being  
made of natural  
resources by local  
residents)

## RECOMMENDED COMPREHENSIVE PLAN (Maps & Text)

Goals and Objectives  
Land Use  
Rural  
Urban  
Residential -- types of major distribution  
Commercial  
Industrial  
Institutional  
Transportation  
Major streets and highways  
Mass transit  
Railroad  
Air facilities  
Community Facilities  
Schools and Institutions  
Parks and Recreation  
Open-space areas  
Sewer, Water and related facilities  
Public and Quasi-public facilities

(these are recom-  
mendations for the  
future, based on  
local resources  
and local needs)

A comprehensive development plan is not a final document. It is  
a starting point. It will require periodic updating, as needs,  
natural resources and economic climate change.

# MEETING RECREATION NEEDS THROUGH COMPREHENSIVE PLANNING AND RECREATION PLANNING

PLANNING AGENCY-PRIME TO ADVISORY RESPONSIBILITY				
PREPARE COMPREHENSIVE PLAN	PREPARE DISTRICT OR NEIGHBORHOOD PLAN	REVIEW & PLANNING ASSISTANCE	REVIEW & PLANNING ASSISTANCE	CONTINUING PLANNING ASSISTANCE
Land Use				CONTINUE OPERATING RECREATION AND PARKS PROGRAM
Transportation			DEVELOP RECREATION AREAS	
Community Facilities	PREPARE RECREATION PLAN	ACQUIRE RECREATION AREAS	DETERMINE AND ESTABLISH RECREATION PROGRAMS	CONTINUALLY REEVALUATE RECREATION PLAN, RECREATION PROGRAMS, FACILITY DEVELOPMENT, ADMINISTRATION, AND OPERATIONS AND MAINTENANCE.
<ul style="list-style-type: none"> <li>◦ Sewer, water and related facilities</li> <li>◦ Public and quasi-public facilities</li> </ul>			PREPARE SITE PLANS FOR INDIVIDUAL PARKS	
<ul style="list-style-type: none"> <li>◦ School and institutions</li> <li>◦ Parks and Recreation</li> <li>◦ Open space areas</li> </ul>	<ul style="list-style-type: none"> <li>◦ Goals and objectives</li> <li>◦ Natural resources, environmental and open space</li> <li>◦ Programs</li> <li>◦ Facilities</li> <li>◦ Administration and Personnel</li> <li>◦ Maintenance and Operations</li> <li>◦ Financing for Operations and capital improvements</li> </ul>			
RECREATION AGENCY - ADVISORY TO PRIME RESPONSIBILITY				

A Comprehensive Plan is prepared to guide the future growth and development of a community. A Recreation Plan builds on the factual information, policies and recommendations in the Comprehensive Plan. The Recreation Plan focuses on specific sites to acquire for recreation, detailed programs for all age groups, facility development, administration, operations and park maintenance and financing.

Although preparing the Comprehensive Plan and Recreation Plan go hand-in-hand, the planning agency has the prime responsibility and the recreation agency has an advisory responsibility during the preparation of the Comprehensive Plan. These roles gradually switch, however, as the community prepares and implements its Recreation Plan.

## Recreation Plan

The comprehensive plan provides the basis for the community's recreation plan. Using its estimates of future population, future recreation needs can be estimated in detail in the recreation plan. The recreation plan provides a program for acquisition of specific properties within the broad areas identified by the comprehensive plan as suitable for recreation use. The recreation plan continues with detailed programs for facility development, operation and maintenance, and budgeting and financing. These programs are not part of the comprehensive plan.

In brief, the comprehensive plan provides general concepts and goals; the recreation plan fills out the details for a community recreation program. The accompanying chart shows in graphic form the relationship between the two types of plans.

If properly done, the recreation plan will spell out the community's recreation needs, and highlight present and future strengths and weaknesses. It will also satisfy an important requirement for receiving Federal and State grants. Quite naturally, before they entrust you with public funds Federal and State officials want to be sure that local government has carefully considered what the community wants and needs, has selected the most worthwhile projects from the possibilities open to it, and has the physical, human, and financial resources to carry them out, with some assistance in getting started.

Here is a possible outline for a recreation plan.

## Recreation Plan Outline

### INTRODUCTION AND BACKGROUND

Origin and scope of the plan

Legal authority of the recreation agency (if already established), or other agency preparing the plan

Objectives -

General statement of the degree to which the local government will try to meet local recreation needs.

Definition of how recreation relates to other community functions.

Statement of policy on environmental protection and development controls.

General description

Brief history of recreation and open-space preservation in the community

Government capabilities: list of agencies at all levels of government currently involved in recreation within the local government boundaries, and a description of the current recreation responsibilities of these agencies

Neighborhoods and social groups -- relation to recreation needs

(much of the input here will be provided directly by recreation agency. Some will be derived from planning agency)

### HUMAN RESOURCES

relation of population characteristics detailed in the comprehensive plan to present and future recreation needs. Use as a guide the standards suggested in the State-wide Outdoor Recreation and Open Space Plan as to the number and capacity of recreation facilities of various types that should be available for a population of given size.

(basis for this is the estimates of future population provided by planning agency)

## NATURAL RESOURCES (Text & Maps)

same factors as in comprehensive development plan, but in less detail, focused on their effect on recreation. The purpose is to also identify an environmental and open space framework for recreation including

slopes, ridges and other significant land forms

Geology and Soils

Hydrologic and drainage areas and flood plains

Woodlands and vegetation

Prime Agricultural lands

Fish and Wildlife habitats

Other information to consider includes water frontage

climate (relating to snowfall, winter sports, length of outdoor season)

(this section should describe natural resources which might be converted to recreational advantage, not neglecting possible historic locations. Development trends should also be noted and special attention paid to ecologically important natural areas which are threatened by development pressures. Acquisitions would be made in harmony with this framework.)

## INVENTORY AND ANALYSIS

Existing programs (tables & text)

County or municipal (also State and Federal, if nearby)

Schools

Quasi-public: Y's, Scouts, churches, 4-H, Little League, Boys Club, etc.

Private

Existing Recreation Facilities and potential areas

County or municipal (also State and Federal, if nearby)

Schools

Quasi-public

Private

(much of the input here would come from the planning agency and comprehensive plan)

(this information would be developed by recreation agency)

Special facilities -- unique environmental and historic areas, river-front developments, etc.

Open spaces and recreation

Financing

Capital and current budgets

User fees, concessions

Government grants, other help

Private gifts

Administration and Personnel

Policy statements and procedures

Intergovernmental cooperation

Local agency structure

Line of responsibility

Table of organization -- duties and responsibilities

Hiring and training policies

Salary and benefits schedule

Maintenance and Operation

Operating structure

Personnel and supervision

Equipment review

Line of responsibility

(some input would be provided here by planning agency, but recreation agency would work out possibilities in detail)

## RECREATION PLAN (map & text)

Goals and Objectives

Natural Resources, Environmental and Open Space

Recreation Programs

Recreation Facilities

Recreation Administration and Personnel

Recreation Maintenance and Operations

Recreation Financing for Operations and Capital Improvements

(this is developed by recreation agency.)

## RECOMMENDATIONS AND IMPLEMENTATION

Based on the local recreation standards adopted and on the projected population and projected demand for recreation of various types, acreage and facility development objectives should be established for the community. These will serve as a yardstick against which to evaluate current recreation programs and facilities and evaluate future proposals.

This section, therefore, should include immediate and long-range projections for the next 20 years for each of the major headings in the Inventory and Analysis section. It should include an implementation schedule for each heading, coordinated with a five-year capital and current budget projection.



Some of the major subjects in the previous outline are self-explanatory. The Inventory and Analysis section should be a detailed inventory in tabular form of existing programs and facilities. It should cover such points as:

- 1) Inventory of summer playgrounds. Duration, leadership, attendance.
- 2) Adult and senior citizen programs.
- 3) Any emphasis on the arts and culture as contrasted with the usual sports, games, and activities programs.
- 4) Social events and celebrations.
- 5) Analysis of leadership quality.
- 6) Coordinated attempt to reach all ages, at as many seasons of the year as possible.
- 7) What are the real goals and objectives of the current program?

It would be best to determine what types of recreation programs and facilities local residents would like by making a direct survey of their recreation preferences. Consider, also, the preferences of people in your region of the State, as indicated in the State Plan.

The term "local standards" needs further explanation. The first phase of the State Outdoor Recreation and Open Space Plan (Concept Plan I) suggests standards for various types of recreation facilities in terms of given population.

For a county or region, the State Plan suggests per 1,000 population:

5 acres of intensive use areas (facilities for sports, games, swimming pools, etc.)

10 acres of parks and natural areas (for walking, picnicking, nature study, etc.)

10 acres of regional recreation lands (parks which serve a county or multi-county area)

For a municipality, the State Plan suggests per 1,000 population:

1.25 acres of playgrounds, ranging in size from 0.5 to 7 acres each. Thus, a 5-acre playground would serve an area of 4,000 population.

1.25 acres of playing fields -- baseball diamonds, football, soccer and lacrosse fields, etc. -- ranging in size from 5 to 15 acres each. Thus, a 10-acre playing field would serve a population of 8,000.

2.50 acres of small parks, at least one acre each. Thus, a one-acre park would serve a population of 400.

5.00 acres of major parks, at least 50 acres each. Thus, a 50-acre park would serve a population of 10,000.

Portions of school grounds could be used as parks, playgrounds, and playing fields.

Marked variations from these standards should be explained in the recreation plan in terms of particular needs and characteristics of the community. Once you have made an inventory of existing programs and recreation facilities, these standards will show whether the community is now doing an adequate job of meeting recreation needs, or whether it needs additional or expanded facilities. The standards will also show, when measured against projections of future population, how much will have to be added to the present capacity of recreation facilities in order to meet future demand.

The findings of the recreation plan will show which recreation projects have the highest priority in the community. In addition, the Local Priority Scoring System explained in the State Plan should be used as a guide.

Program recommendations in the final section of the plan might then include some of the following:

- 1) Continuation or expansion of existing programs.
- 2) Initiation of new activities.
- 3) Acquiring or otherwise protecting unique natural areas designated in the State Plan.
- 4) Organization of personnel and leadership.
- 5) Reorientation of goals and objectives.

In addition to understanding what a properly-executed recreation plan includes, it should also be understood what it does **not** include at this early stage. It is not expected to include the following detailed information, which would be developed later:

- 1) Detailed site plans.
- 2) Feasibility studies of specific projects.
- 3) Schematic designs.
- 4) Property surveys.
- 5) Real estate appraisals.
- 6) Engineering and construction estimates.

It will take a long time, a year or more, to develop a proper recreation plan. As you go, be sure that the local action team or board keeps abreast of developments in the community. Be alert to possibilities for bringing in new people. Especially, be sure to hold frequent open hearings in neighborhoods and at municipal offices to tell people what is being considered and give them opportunities to comment. Keep the newspapers informed by personal visits and interim progress reports. Panel discussions on TV and radio, providing an opportunity for several points of view to be expressed, are particularly effective, and may be educational for you as well as for the audience. Speeches before community groups and civic organizations are also useful. The more you do to keep the whole community informed and thinking about recreation, the better the plan will be and the less trouble there will be in carrying it out.

By December of each year, whether or not the recreation plan has been completed, an annual program for recreation should be submitted to the Department of State Planning and Department of Natural Resources (through the county liaison officer). Upon review, these programs will become a factor in allocations of State aid.

The annual capital program is a schedule of projects for site acquisition and/or site development which the community expects to undertake during the next fiscal year, listed in order of priority, and including such information as: the governing body which is sponsoring the project; type of facility; total estimated cost. Special forms are available from the Department of State Planning to be used in submitting the annual program. This annual schedule is, of course, part of the schedule to be shown in the Recommendations and Implementation section of the recreation plan.

Although it is not an easy task to prepare a recreation plan, the resulting document may be simple in the case of a small community. For an area with large population, it will be bulky. If the complete plan is a massive document, it should be published in two sections -- basic facts and summaries in one section, and detailed statistics and other backup information in the second. The first booklet should be distributed widely in the community to gain support and understanding of the program.

Whether 20 pages or 300 pages in length, the recreation plan and the comprehensive plan should provide a detailed picture of your community. The overall plan is a framework within which your recreation agency can work to select recreation sites of various kinds, since it provides for preservation of stream valleys, wetlands, woodlands, steep hillsides and significant geologic features from residential, commercial and industrial development.

If a county or municipal agency does not have a fulltime professional in the field of recreation, it may be necessary to seek help from a consultant. Details on the process of selecting a consultant are presented in a later chapter of these guidelines.

# CHAPTER III

## LAND ACQUISITION

This section describes methods of land acquisition. Site development, budgeting and financing, facility operation and maintenance, and public relations and communication will be described in more detail later. Some of this information will be useful in preparing the plan. Much of it will be more helpful as the community starts putting its plan into action.

Assume now that the community and its permanent agency for parks and recreation has prepared the recreation plan. This study has, in its areas and facilities projections, identified certain tracts of land to be acquired or controlled as potential recreation sites. These sites will be located in the areas identified in the natural features segment of the comprehensive plan. They may include vacant lots, agricultural land, stream valleys, woods, and fields, in private or public ownership. Also, tax delinquent land and Federal, State, or local government surplus land should be considered as potential sites. In its proposed capital budget projection, the plan has established priorities for land acquisition and has estimated costs for acquisition, with specific properties in mind. Usually, the tracts will be identified merely by general location with approximate size based on need and the available property, without specifics of exact acreage, boundaries, title information and property evaluations. As previously pointed out, the plan would not include property surveys, legal descriptions or closely estimated costs, but determine only that land is available where a need exists.

The agency must now begin the delicate, time-consuming process of land acquisition. This will be more complicated than a purchase by a private individual. One reason is that government must work in full view of the public and of prospective sellers. Another reason, if a Federal or State grant is desired, is that the agency must keep in touch with and develop proper documentation for these higher levels of government.

The recreation agency starts by inspecting the area where it seeks to acquire land. It examines all possible sites, and selects the approximate boundaries of the tract or tracts it wants to buy as a park or for open space.

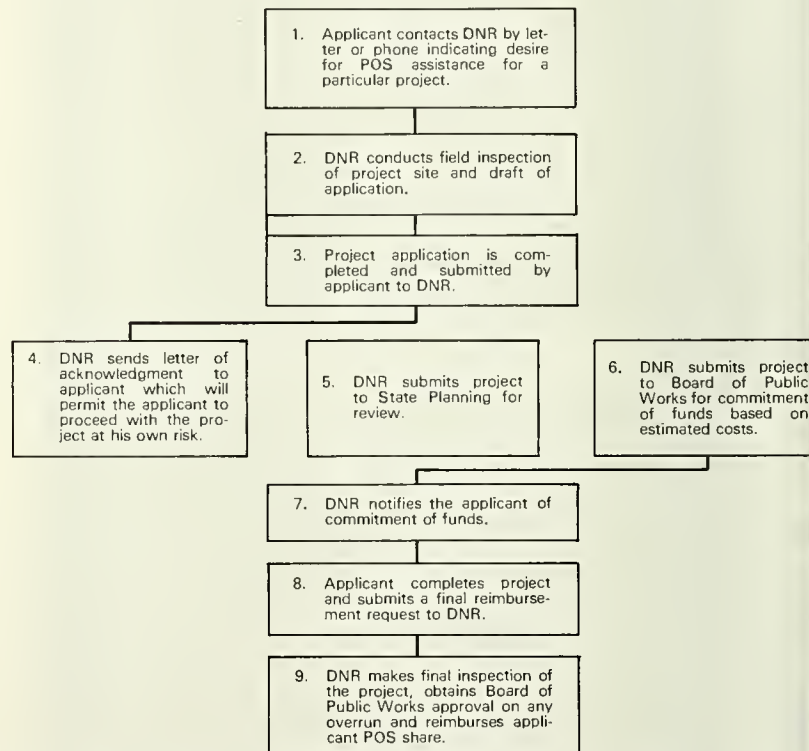
If the agency expects a government grant, this is the point where it gets in touch by letter or phone with the State. In the case of a municipality, Maryland law requires that it work through the liaison officer of the county who has been appointed to be the main contact in all dealings with the State. The proper State agency to contact is the Department of Natural Resources (DNR), whose office is listed at the back of this booklet. See the flow chart for the overall process of securing a grant under the State's Program Open Space (POS), which is the grant program for assisting local government in acquiring and developing park land. DNR will assign a project officer to help evaluate the land and assist with the grant procedures from tentative approval to completion of the project.

At the same time, your recreation agency should recommend to the governing body of the county or municipality that local government funds be authorized for preliminary site investigations. By "preliminary", we mean that certain steps have to be taken before the recreation agency can determine whether the land in question is really suitable for the intended purpose and whether it can be acquired at reasonable cost. These preliminary investigations may include all or part of the following:

- 1) a preliminary plan
- 2) preliminary property appraisal
- 3) preliminary title investigation

By this time, informal discussions will be under way with the owner, in an effort to establish a meeting of the minds as a forerunner to making a firm offer for the property. These talks may be conducted by representatives of the recreation agency, by board members (if there is a recreation board), or directly by municipal officers.

#### THE PROCESS FOR SECURING A GRANT UNDER THE STATE'S PROGRAM OPEN SPACE ( P O S )



## Selecting The Team

Before the preliminary site investigations and discussions with the owner begin, it is very important that the local governing body and the recreation agency define who will be responsible for conducting them. When a joint school-recreation project is involved, the school will of course also be in the picture.

A team should be selected consisting of a negotiator and perhaps two or three other professionals with experience in real estate, engineering, surveying and real estate law. If the recreation agency has retained a consultant, he should be on the team. It may well be, depending on circumstances, that the agency should leave negotiations in the hands of its governing body, acting through its chief executive. The chief executive, and sometimes the agency itself, and school board where appropriate, may be able to make available an engineer or lawyer. An experienced local realtor, with no personal interest in the land to be acquired, may be asked to join the team. The recreation agency and governing body (also school board where appropriate) must remain in close touch with each other throughout the acquisition process, to prevent future complications, slowdowns, and legal pitfalls.

During preliminary talks with the owner, any price mentioned by the buyer must be contingent on results of a final survey and title investigation. In other words, no firm offer can be made yet. However, much can be gained by feeling out the owner's attitude toward a possible sale.

At some point along the way, possibly based on a recommendation in the plan, the recreation agency must decide whether the land is to be acquired in fee simple title (full ownership) or controlled by long-term lease, easement or other lesser interest. In some cases, the agency may simply be seeking to add adjoining property to an existing recreation or school site -- but the process is no different than if it were acquiring a new site.



## Property Survey

We will assume that the property acquisition is to be fee simple title. If preliminary investigations and discussions with the owner prove satisfactory, the acquisition team or the chief executive of the local government should now ask a registered professional engineer or land surveyor to prepare a plat survey of the property. No matter who initiates the survey, it must be done with the permission of the governing body, which will have to pay the fee. The plat survey will be a basis for further negotiations, grant applications and appraisals.

We suggest that the property plat first be made from the deed description on a small 8½" x 11" or 8½" x 14" drawing upon which is graphically represented as much information about the property as can be provided without an on-site perimeter survey. As a minimum, the plat should show:

- 1) Boundaries of the property with bearings and distances, drawn to scale. Closure should be checked;
- 2) Approximate topography; contours taken from existing information such as U.S. Geologic Survey maps;
- 3) Names and property boundaries of adjoining landowners;
- 4) Approximate location of all improvements on the site;
- 5) Location and description of adjacent roads, rights-of-way, etc.
- 6) Approximate location of existing utilities;
- 7) Approximate vegetation limits;
- 8) Unusual or unique features;
- 9) When only part of a tract is to be acquired, the proposed severance line;
- 10) Explanatory notes;
- 11) Linear scale, north arrow, professional seal and standard identification.

Quite possibly, the property under investigation may be so complicated that the surveyor may recommend an on-site survey. You will then have to weigh the cost of investing in an on-site survey against the possibilities of actually acquiring the land. If the property needs an on-site survey, it will have to be done later on anyway if you really want the tract.

## Appraisal

When the acquisition team has the plat survey, it proceeds to have the property examined by two qualified appraisers who are independent of each other. This is required for grants under Maryland's Program Open Space. The form of appraisal reports is shown in the *Grants-in-Aid Manual*, providing detailed information on Program Open Space and how to apply for grants-in-aid under the program.

If the local government has the power to condemn property, it should select appraisers with experience in condemnation and court testimony. It is important that the acquisition team and the appraisers understand the report form to be used, and what is to be included in it. A simple statement on the letterhead of a local realtor will not be acceptable.

It may be helpful to conduct the appraisal in three steps, because the recreation agency may wish to modify its original boundaries for the site, once a reasonably realistic price has been developed.

1) The first appraiser might submit his report in preliminary form by letter to the acquisition team. This might lead to revision by the recreation agency of its original plan to acquire the property in question, if the appraised value suggests that the tract will have to be smaller to be financially feasible, or the particular tract given up altogether. It is also possible that the appraised value may be lower than expected, opening the way to a decision to broaden the boundaries of the site.

2) After a final decision on boundaries has been made, the first appraiser could then submit his detailed report on the form required by DNR.

3) The second appraiser would then examine the site and submit his report in final form.

## Title Search

While the appraisals are being made, the legal member of the acquisition team or, if there is none, the attorney who handles legal matters for the local government should be making a title search. His report should show in detail:

- 1) Past and present ownership of the property;
- 2) All outstanding liens, mortgages, covenants and encumbrances;
- 3) Status of any lesser interests severed from the ownership, i.e., mineral rights, leases, rights-of-way, easements, etc.

The actual work might be done by a title company. Later, after the property has been purchased, the legal adviser should see to it that the title is insured.

The expenses incurred up to this point by the local government and recreation agency are considered "preliminary" acquisition costs, and will be reimbursed in Federal or State grants if the project is carried through to completion. Don't spend this money with the hope of getting a grant, unless it is certain this project is needed by the community.

You can appreciate that the process of land acquisition by local government, to be assisted in part with Federal or State funds, is complicated. It is important to maintain constant contact with appropriate State and Federal officials to ensure that the proper steps are being undertaken. As the local recreation agency prepares the groundwork to make a firm offer for the land, it must keep in touch with DNR to see that it has assembled the proper backup information for a grant application under Maryland's Program Open Space.

By the time the agency is ready to make a firm offer for the property, several months and even a year or more may have gone by. This delay must be allowed for in planning.

If the owner is unwilling to accept an offer, local government has the power of eminent domain and can of course proceed to take the property by condemnation. It should be recognized, however, that condemnation takes time of municipal employees and money for legal fees. The State will not grant funds on that part of the acquisition cost which it considers above fair market value.

## Grants-In-Aid

At any rate, let us assume that the property negotiations have been completed. This will permit completion of the project application, since a definite cost has been established. What follows is a review of the major points to be included in the application. Additional information will be found in the *Grants-in-Aid Manual*.

The agency must be able to certify on its application that:

- 1) The project conforms to the plan. If this is a municipality, it must also conform to the county plan.
- 2) A governmental agency is in charge of carrying out the program.
- 3) Funds are available or will be available within twelve months of the date of the application to pay the local share of the project cost.
- 4) The value of the land or the interest therein proposed for acquisition has been established by qualified appraisers.
- 5) The agency has applied for Federal funds and has received notice of Federal approval or disapproval. Or it has applied for Federal funds and has not received notice of approval or disapproval within 120 days of submission of its application. Or it has verified that the project is not eligible for Federal funds.  
(The availability of Federal funds and procedures for applying for such funds is changing rapidly, and therefore is not described in the **Guidelines**. Consult the Department of State Planning for available Federal grant programs and application procedures.)
- 6) The rules and regulations of DNR have been complied with.

As the **Manual** spells out, grants will be made for acquisition of sites for local recreation serving a wide variety of activities. However, priority will of course be given to those local projects given the highest priority under the Action Plan -- Phase III of the Maryland Outdoor Recreation and Open Space Plan.

Although acquisition must be primarily for land rather than structures, any project may include improvements (including structures) which are to be used primarily for outdoor recreation or as support facilities for recreation activities. Other improvements may have to be removed. The application must list all improvements on the property and how they are to be used.

When land is being acquired adjacent to a new or existing school (an economic way of providing local recreation, which is encouraged by the State) special information will be needed in the application as explained in the **Manual**. The County Board of Education may acquire such land, if it has statutory authority. Non-recreation uses, such as water conservation, timber management, grazing and other natural resource uses -- or uses pertaining to public education -- may be carried on within the area if they are clearly described on the application, are compatible and secondary to recreation use, and are approved by DNR.

You may be acquiring surplus land from another public agency, which will have no further control over use of the land. In this case, your agency may be eligible for a POS grant, subject to conditions which your project officer can explain. They will be found in the **Manual**.

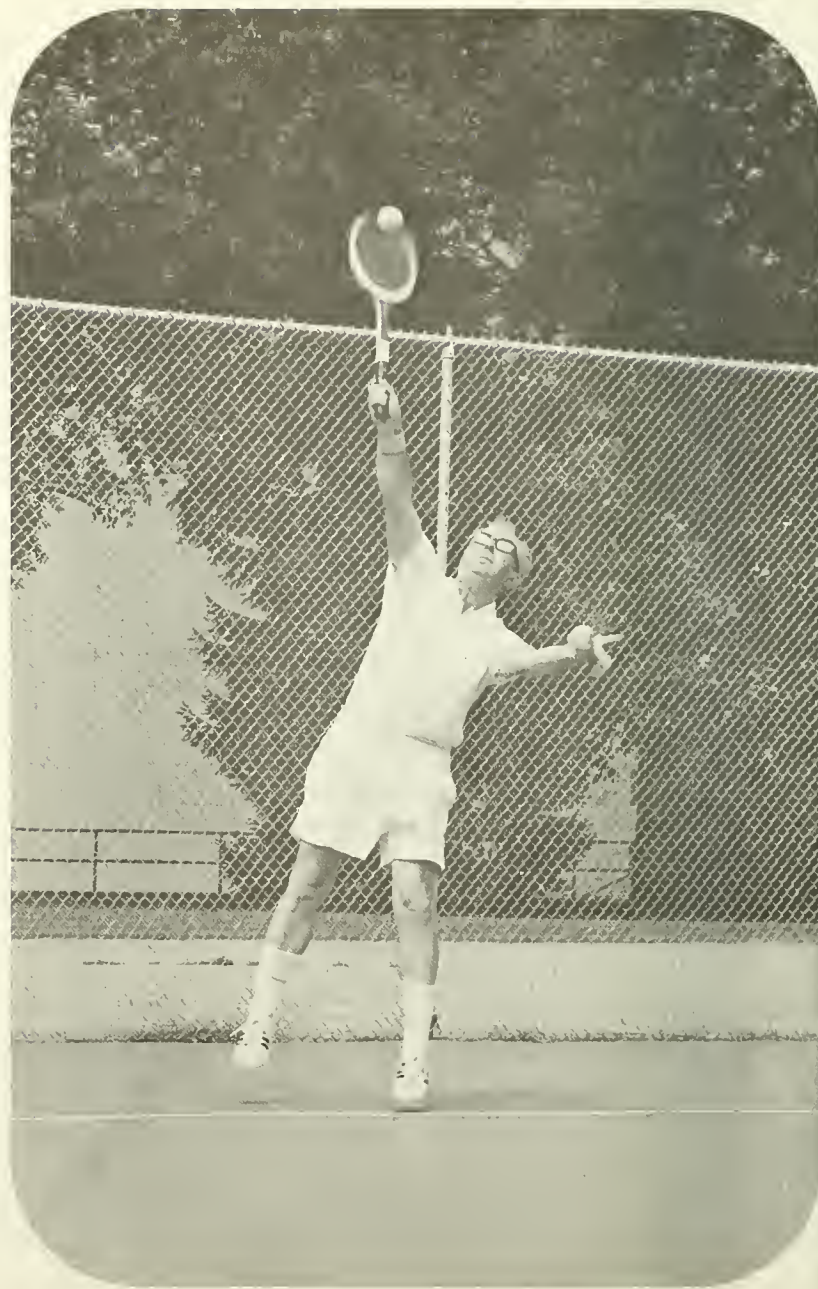
The recreation agency may be involved with a school district, some other public agency, or with a club, civic group, or other organization in joint use and operation of the proposed land to be acquired. As previously mentioned, Maryland law gives this flexibility. In such situations, the grant application must include a Use Agreement to be submitted with the grant application. This carefully defines who has responsibility for development, maintenance, operation, supervision, reservation and scheduling of the facility. It promises to keep the equipment in reasonable repair throughout its estimated life, and to make no change in the intended use of any part of the land on which POS assistance has been granted without consent of the Secretary of Natural Resources and the Secretary of State Planning.

Examples of joint projects where Use Agreements must be provided:

- A recreation agency proposes a tennis court on land owned by a school district.
- County commissioners give a 4-H organization authority to develop and administer a park on county-owned land.
- A city recreation department wishes to develop a swimming pool on land leased from a quasi-public recreation center.

After the application has been received by DNR, the Department will send a letter of acknowledgement. This is not a commitment; it permits the applicant to proceed with the project at its own risk.

The date of this letter is the start of the "project period" The ending date of the acquisition project is set in the application. POS funds will be granted only for costs incurred during this project period. If acquisition takes longer than anticipated, the agency must apply to DNR for an extension 90 days before the ending date.



DNR forwards the application to the Department of State Planning for review. After review, DNR submits the application to the Maryland Board of Public Works for commitment of funds based on estimated costs. DNR then notifies the applying agency after the commitment has been made.

It is not hard to see this necessary review process will take considerable time. You will of course be kept advised from the start of the land acquisition process by the project officer assigned by DNR. He can help estimate the time it will take to complete the processing of the application.

It might be necessary, for instance, to take an option on the property to keep it available at a fixed price until you are successful in getting a grant. Option agreements should be valid for a minimum of six months, preferably a year. The agency will of course have to pay the owner for the privilege of the option, which binds him to sell it within the time period at a fixed price, but does not commit the agency to buy at that price. The agency may be able to get a commitment of funds from the State to help pay for the option, if it is to be part of the purchase price.

How likely is it that the agency will receive a grant-in-aid under Program Open Space, and how much will it get? Program Open Space provides substantial funds every year to local jurisdictions, and this successful program is now on a pay-as-you-go basis. The program includes both State funds, made available by a 0.5 percent transfer tax, and Maryland's annual share of the Land and Water Conservation Fund, a federal program administered by the Bureau of Outdoor Recreation, U.S. Department of the Interior.

If the agency succeeds in getting Program Open Space funds for a project, the State will provide 100 percent reimbursement for the acquisition of land. One-half of all the money distributed to the local jurisdictions must be used for the acquisition and/or development of open space land and recreational facilities. The agency may be reimbursed for up to 75 percent of the total cost of a development project. In other words, if the agency succeeds in getting Program Open Space funds to help with property development, the local share will be 25 percent of the total project cost.

If Federal funds are received for the project after it has been given State assistance under POS, the agency must reimburse to the State an amount equal to the Federal contribution. This reimbursement will be reserved for other projects approved for your recreation agency up to the amount allocated by the State to your local governing body.

As previously mentioned, the agency may be successful in getting donations of land. If so, 75 percent of its appraisal value as

approved by DNR may be applied toward part or all of the local share of project cost.

In some cases, it may be advantageous for the recreation agency to acquire a specific tract while still available and undeveloped, even though it does not plan to develop it for recreation purposes for some years, and little or no public recreational use is expected in the meantime. The agency may receive a State grant, provided it certifies in writing to the Secretary of Natural Resources that the acquisition is necessary at this time, future development will be for recreation and/or open space purposes, and interim use will not adversely affect future recreation and/or open space use.

To clarify the matter further, the **Manual** lists types of projects which will **not** qualify for POS grants. These include:

- 1) Acquisition and/or restoration or preservation of structures, as distinct from outdoor space.
- 2) Acquisition and/or development of areas and facilities to be used primarily for semi-professional and professional arts.
- 3) Acquisition and/or development of land for amusement facilities such as merry-go-rounds, ferris wheels, children's railroads, exhibit-type developments and convention facilities, even when part of a larger outdoor recreation area.
- 4) Acquisition and/or development of areas or facilities to be used solely for game refuges or for fish production, unless they are open to the public for general, compatible recreation use or serve priority needs identified in the State Plan.
- 5) Indoor recreation facilities not directly related to outdoor recreation, except under special conditions.
- 6) Acquisition and/or development of areas and facilities required by State and county regulations to meet basic needs related to public education.
- 7) Purchase of recreation equipment with a life expectancy of 15 years or less.
- 8) Maintenance, repair or replacement of equipment and/or facilities, regardless of life expectancy, which have deteriorated due to lack of maintenance.



## Allowable Costs

POS grants are made on a project basis. The recreation agency will in most cases pay all bills incurred during the project period, and be reimbursed by the State on its share on submitting its bills to the Board of Public Works through DNR. Bills may be submitted after completion of the project, but if the agency is unable to wait that long, they may be submitted periodically during the project period, but no more often than monthly.

To be allowable for assistance, costs must meet the following criteria:

- 1) Be necessary and reasonable for proper and efficient administration of the project, be allocable thereto and not, except under certain conditions, be a general expense required to carry out the overall recreation responsibilities of the local governing body. Detailed information should be required for each project.
- 2) Be authorized or not prohibited under State or local laws or regulations.
- 3) Be consistent with policies, regulations and procedures that apply uniformly to both State-assisted and non-assisted activities of the unit of government of which the recreation agency is a part.
- 4) Be treated consistently through application of generally accepted accounting principles appropriate to the circumstances.
- 5) Be net of all applicable credits, such as discounts, rebates, recoveries on losses, sale of items, etc.

Incidental costs of acquisition of real property and of interests in real property will not receive POS matching funds. These include: costs of surveys, appraisals, title search, and legal fees.

## Other Forms of Acquisition or Protection

**Installment purchases** - Because of financial limitations, you may wish to negotiate a per-acre price with the owner and agree to buy a certain number of acres each year. Under certain conditions, the owner is relieved of paying property tax on the entire property at the time the agreement is made, but may choose to remain on the land until all has been purchased.

**Long-term lease with option to buy** - This involves negotiating a lease price with the owner and includes conditions for use and eventual purchase of the property.

**Purchase and leaseback** - Under this method the property is purchased while still available at low cost. The recreation agency then leases the land for use by others, perhaps the original owner, in accordance with restrictions for scenic preservation and recreation. This puts the public agency in the position of a landlord, which can be a disadvantage even though it is a source of income. Also, this method takes the property off the tax rolls.

**Purchase and resale** - A technique in which land is bought and then resold under conditions or restrictive covenants. After resale, the agency is relieved of ownership and maintenance responsibilities and the property is taxable, although usually at a reduced rate.

**Easements** - These are restrictions which permit the property to remain in private ownership. Only those rights needed to regulate use of the property are purchased by the agency. The property remains taxable, less the value of the easements.

**Donations** - These can be encouraged by granting lifetime occupancy rights and granting certain tax advantages to the owner.

**Voluntary agreements** - Private owners of large tracts of farmland or unused property, or other government agencies holding land, may be willing to voluntarily restrict use of their lands for recreation and open space.

**Tax-delinquent land** - Parcels of this kind can sometimes be acquired by local governments in densely-populated areas where parks are greatly needed. Usually the land is an eyesore when acquired. Often it can be developed by volunteer labor and even with volunteer funds, and then maintained on the same basis.

**Permanent land trust and conservation funds** - These are nonprofit, tax-exempt trusts, usually organized by a citizen-supported, nonprofit service agency, which manages the property, while a bank usually manages any financial assets. This approach enables donors of land, money or securities to take advantage of tax deductions while being assured that the future use of the land donated will be controlled according to their wishes.

**Open space land bank** - A public agency or nonprofit private entity acquires strategically located recreation or open space land and retains it in a land bank until it is appropriate to sell, lease or develop the land for a public purpose.

**Land exchange** - The recreation agency may be able to exchange lands it owns (perhaps tax-delinquent property) for land which would be more useful for recreation purposes, in the hands of another public agency or other friendly owner.

## Taxation and Zoning as Protective Devices

The power to tax can be used as a tool to protect land, as has already been pointed out. Tax exemptions are sometimes authorized for land that provides public benefit, such as historic places and lands open to hunting, fishing or other public uses. Private owners could provide public benefits by keeping these lands undeveloped or having them developed in accordance with the plan, while enjoying a tax benefit. Chapter 576 of the Maryland Annotated Code allows tax credits up to 100 percent of the local property tax if the owner grants a perpetual easement for public recreation use to the county, state, or federal government.

**Preferential assessment** is a technique whereby land being taxed because of its use can be kept in its present use for a longer time. The land is assessed at its agricultural or other lower-use value to remove tax pressure on owners to sell at a higher price for commercial, industrial or residential purposes.

A **long-term land use stabilization contract** is a similar method by which the local government and the owner of land which is designated as open space, farmland, woods or some other use in a comprehensive plan, agree that the land will be kept in its present use for a long period and that it will be assessed at its present use value.

**Zoning** has of course been used in the counties and municipalities of our State for many years. As it applies to recreation and open space, this method of land use control obviously can affect density of development, protecting areas where open space and natural characteristics should be preserved.

In cluster zoning, for example, permission is given for dwelling units to be placed closer together than normally allowed in the zone in which they are located, thus providing open spaces between clusters of housing. Flood-plain zoning preserves scenic beauty and natural areas along rivers and streams by forbidding residential use. Steep slopes may be protected by zoning, in order to preserve stream valley corridors.

**Subdivision regulations** should work in concert with zoning to preserve open space and natural features, by layout of lots, streets, drainage, utilities, etc.

# CHAPTER IV

Site development can be very simply defined: the conversion of raw land into land developed for its basic intended use; in this case a park, open space, or recreation area of some kind. An area already developed for recreation use may of course receive further development.

We will assume that the agency is developing, for recreation purposes, an area that has not been used in that way before. The plan had spelled out how the land should be developed and how it should fit into the community's overall recreation system. In other words, the tract has been designated because of its size, location, or other special characteristics as a playlot, neighborhood park or playground, community playfield or park, camping area, scenic area, or for some other purpose or combination of purposes.

Just as in the case of land acquisition, the development timetable is part of the capital improvements program included in the plan, or as modified by later experience. Development is initiated by recommendations of the recreation agency and under the authority of the governing body.

Once land is available for a park or other facility, the public will want to use it. The agency must put in water and toilet facilities, adequate safety features, and provide supervision. Public use of an undeveloped area may lead to damage suits, and at the very least to dissatisfaction and demands that the recreation agency develop the site.

The immediate program need not call for complete development of the site, but implies that any work be completed to its best and fullest extent so that the facility is usable and safe. It makes sense to concentrate available funds on doing one or two things well rather than to spread the money over a number of items, none of which is properly completed. If a park is to be developed for picnicking only, then develop the best picnic area possible with roads and parking, tables, cooking grilles, drinking water and toilets. The playground, swimming pool, trails and other features can come later.

Whether site development is performed by municipal staff and materials, commonly known as force account, or by an outside contractor, it will need further planning. First, there must be a graphic portrayal of what the finished facility will look like. Second, there must be detailed construction plans to tell someone how to do the work.

## SITE DEVELOPMENT

# Preparing A Site Development Plan

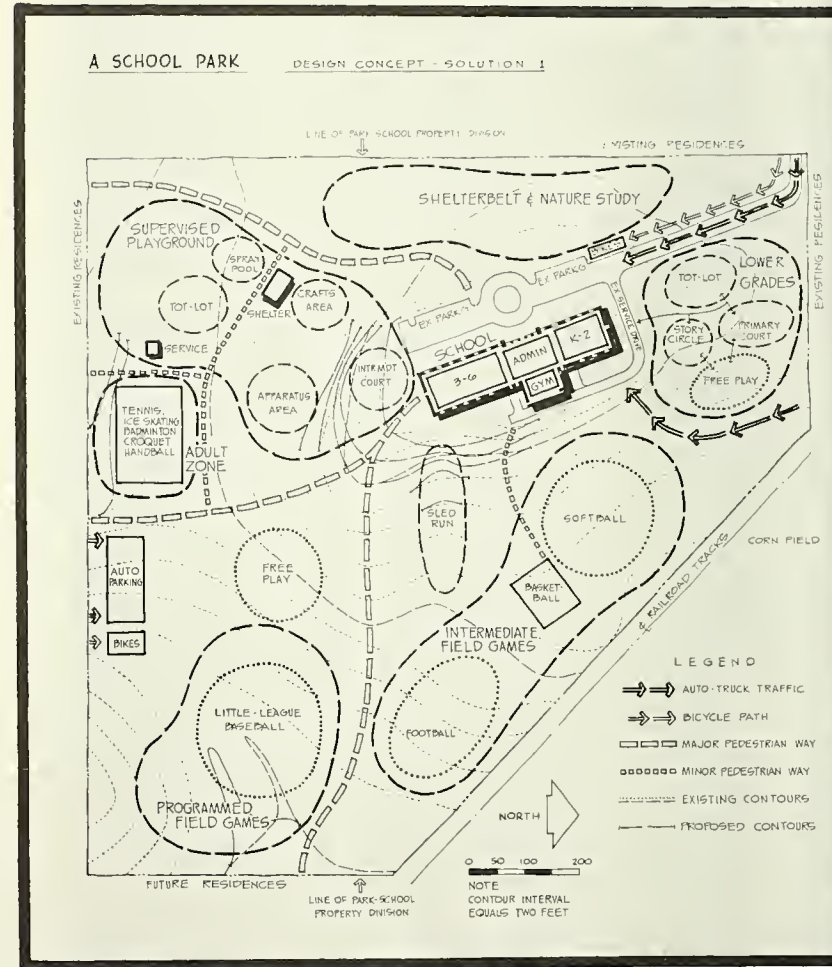
Begin by preparing a site development plan, which has exactly the same relationship to the individual site as the overall recreation plan has to the long-range community recreation program.

Like the overall plan, a plan for site development takes time. It will require the services of a professional, either an architect, engineer or a landscape architect experienced in designing recreation areas. Government agencies at the State and Federal levels, who have site development going on all the time, can afford full-time professionals. Your agency may choose to hire a consultant, just as it may have had to use a consultant in preparing its overall recreation plan.

Whoever you appoint, this professional designer will have to begin by collecting as much information as possible about the site. Basic site information would normally consist of:

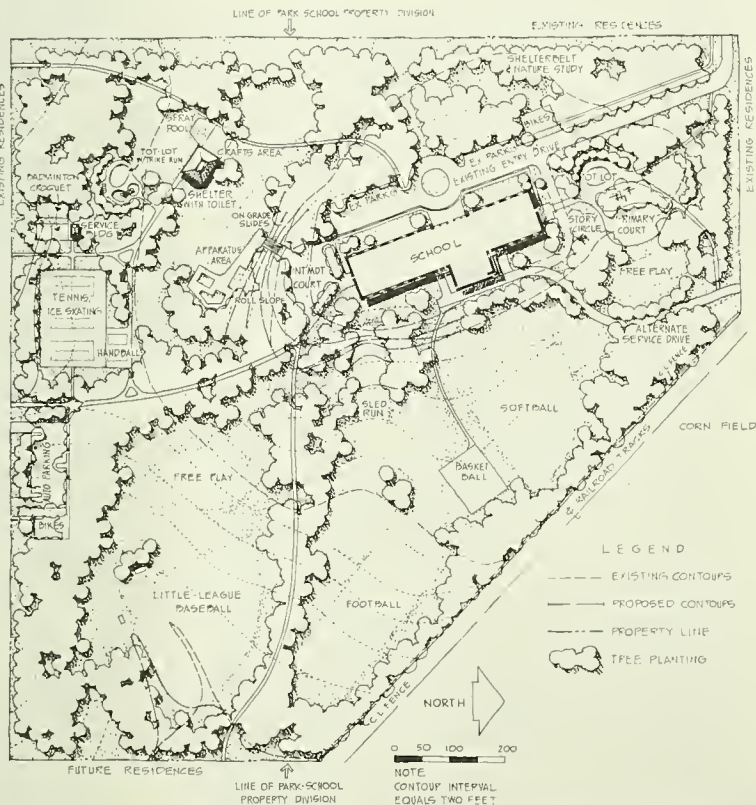
- 1) All visible planimetric detail drawn to scale and exact location.
- 2) Existing contours at a workable interval.
- 3) Exact location of existing and proposed road and street lines, curbs, walks, rights-of-way and easements showing existing grades.
- 4) Exact location of all utilities such as sanitary and storm sewers; utility lines, overhead and buried; poles, curb boxes, catchbasins, manholes, etc.
- 5) Location and character of all unusual features or conditions, such as streams, specimen trees, marshes, rock outcrops, etc.
- 6) Location and description of adjoining features such as nearby utilities, structures, and unusual features.

In addition, the designer should be thoroughly familiar with the purposes for which the site is to be used. It may be that the recreation agency and community groups have come up with new ideas for use of the site. Of course, these changes should go into the overall recreation plan as it is updated each year. But matters of this kind have a way of getting confused as the membership of the recreation agency changes and changes take place in the community.



Source—Anatomy of a Park: The Essentials of Recreation Area Planning and Design, by Albert J. Rutledge (McGraw-Hill)

# A SCHOOL PARK SITE PLAN SOLUTION 1



It may also happen, after a thorough analysis of the site, that the designer may conclude it is not suitable for some of the intended purposes. One of the temptations is to over-plan a site, including every conceivable type of equipment and activity, and to sacrifice the open-space amenities (where people simply walk or ride and look) to active games and sports. If the agency has given into this temptation, the designer may recommend some re-thinking.

Even if the recreation purposes of the site have been agreed upon, there are a number of different ways of developing the property in order to provide them. Some are better than others from the viewpoints of enjoyment, safety, ease of maintenance and supervision. The designer may recommend several alternate approaches in schematic form. He will have been developing estimates of how much various approaches might cost. For this, he may have to draw on other outside professionals.

The designer should then meet with the members of the recreation board and/or officials of line departments and other leaders representing a cross-section of recreation interests. Unless you have prepared yourself for this meeting, you are simply gambling that the designer is competent to do the best possible job and that he thoroughly understands what the community wants. If the designer is the only one prepared for the meeting, he has a great advantage over your agency, which will have to live with his design.

Design of recreation areas is a complex art, but board members can develop a feeling for the nature of the problem and some understanding of the factors which could affect its solution. You should of course know what types of programs are planned for the site and, by personal inspection, have satisfied yourself that the property can be adapted to these programs. In order to become an intelligent critic, you should review one or more books on the subject, such as *Anatomy of a Park: The Essentials of Recreation Area Planning and Design*, by Albert J. Rutledge (McGraw-Hill, 1971). This book, for example, has a comprehensive check list to help analyze the designer's site plan.

To understand what the designer is proposing, ask: "Why? What is the purpose in putting (for example) the softball field in that particular place? Is the ballfield sited so that the sun will not be in the batter's eyes? Why is the approach road from the east? Why select concrete instead of wood for the benches? Why are the toilets located so close to the picnic area?" Questions like these will bring out the designer's objectives and assumptions, uncovering arbitrary judgments and unjustified conclusions.

During meetings with the designer, the agency must work out together a balance between recreation needs and costs. In addition to original construction cost, the types, extent, and finances of available maintenance will be very important in determining what can be done. Don't plan to install facilities the agency can't afford to maintain. Remember that State grants are for the purposes of acquiring and developing land, not for operation and maintenance of the completed facilities.

Before long -- and it might take several meetings -- the designer should have a clear conception of the final layout. He can then prepare a site development plan. Its basic elements should include:

- 1) At scale, the detailed relationship of all proposed development features.
- 2) Suggested basic layout of utilities.
- 3) Plan for basic grading, landscaping and planting.
- 4) Off-site improvements to existing access roads, utilities, etc.
- 5) Detailed preliminary cost estimates.
- 6) If necessary, a program for making the improvements by stages.

The site plan should be presented to the community in public hearings, and further revised if this seems to be appropriate.

## Final Site Design

The design planning stage, although rather costly, is important. If not properly done, it may cost the community considerably more to correct mistakes while the work is going on. Cost of site planning is small compared to development and operating costs. Many communities, however, are paying the cost of penny-wise-and-pound-foolish economizing, and will go on doing so for years to come.

Your agency will already have some idea of what these long-run costs are, because the agency should now be making plans for operation, maintenance, and programming. It should be ready to open the facility immediately after completion, so it should be starting to prepare now.

Working from the site plan, your agency must decide what parts it wants to carry out first. As in the land acquisition phase, the agency has been keeping in touch with DNR and has been assigned a project officer. The site plan will be the basis for its application for a grant-in-aid. For complete information on preparing an application for POS funds, see the **Manual**.

The local recreation agency will decide on "support systems" -- roads, parking, toilets, utilities, drainage, etc. Much of the cost of development is for these support systems. Once these decisions are made, the project enters the stage for final design.

During this stage -- which may easily take from three to six months -- working drawings and specifications are prepared. They must be based on detailed knowledge of the site, most of which should have been assembled in preparing the site development plan. However, additional data may be needed. For instance, where 5-foot contour intervals may be satisfactory for site planning a 100-acre park, two-foot contour intervals obtained by ground survey may be needed to engineer the road within that tract.

The designer should present his "preliminary" final design to the agency for final review. There must be complete agreement before final working drawings are prepared. The designer may, for his own protection, ask for a signed set of preliminary prints for his records.

## Bidding Package

The designer is now ready to put together the bidding package, which includes the working drawings, specifications and bid proposal. The package should consist of the following elements:

- 1) Public advertisement
- 2) Instructions to bidders
- 3) Form of proposal
- 4) Form of agreement
- 5) Standard contract provisions
- 6) Form of bidder's bond
- 7) Form of performance bond
- 8) Form of labor and material men's bond
- 9) Federal and State requirements
- 10) Specifications
- 11) Contract plans
- 12) Schedule of minimum wage rates

As with other municipal work, the agency has the option of letting a contract to an outside firm to do the work, or doing it on force account -- people on the local government payroll using materials purchased from outside suppliers.

If the project is put out for bidding, the project officer will advise as to the type of bid to ask for: firm price, firm price with alternates, cost-plus, or other forms. Usually the firm-price bid is best.

Normally, it will take about one month for advertising and receiving bids, and another month for review of bids, contract award, and start of construction.

## Grants-In-Aid

The considerations involved in securing POS grants-in-aid for site development are much the same as in land acquisition. Grants are on a project basis. As the final design stage is reached, the agency will have a very close idea of costs for use in the application. The designer during the course of his work has had to be constantly in touch with the estimated cost of construction. He has been calculating and recalculating costs as final design approaches completion, and keeping in touch with the agency to make any necessary adjustment. He will then provide a final cost estimate before the job is advertised for bids. This estimate should include at least a 5 to 10 percent contingency element to cover unforeseen circumstances in the bidding climate and to carry over into the construction phase. Once contracts are awarded, then a five percent construction contingency should be carried through contract completion, to allow for unforeseen work changes that may be needed.

The designer will be able to help in the bid review process by analyzing the bids. If a bid is unrealistically low, he can spotlight this and help document a case for throwing out the bid. Although competitive bidding will usually be required on construction contracts, there is no obligation to accept the lowest bid if the agency is certain the bidder is unqualified or cannot perform the work properly at the bid price. The State must agree with the decision, if a grant is involved.

Meanwhile DNR can go ahead with final review of the project application and can proceed to send it through the various stages which have already been outlined.

## Construction Period

After the contract is awarded, the designer should be retained by the agency to serve as its technical adviser during the construction period. Part of this work may involve inspection of the site as the work progresses.

The agency should also be keeping the newspapers and public abreast of construction progress. As completion comes close, it should be possible to announce the opening day. Plans for operation, maintenance and programming must be ready. Opening day should be fully exploited with all the fanfare the agency can muster. Now is the time for board members -- and especially elected officials who made the big decision to spend the money -- to take advantage of the event for good public relations. A delay in opening would detract from this good impression.

Arrangements should be made for final inspection of the site by the agency and DNR prior to final acceptance. The contractor should now give a maintenance bond, usually valid for a year, guaranteeing he will make good on defective materials and workmanship.

## Operation and Maintenance

Although a detailed discussion of operation and maintenance is not within the scope of the **Guidelines**, they are the most essential, but least glamorous, functions of the whole recreation program. The original recreation plan should consider with care how these functions are going to be handled -- whether by the municipal works department or by the agency's own staff. As part of this, the board should also have considered the need for increased police protection and surveillance in public areas. It also has to plan in advance for insurance coverage of facilities, staff and the public.

The public has a right to expect clean, safe and sanitary facilities. The local taxpayers and the Federal and State agencies who have paid out the money to provide these facilities have a right -- in fact, a duty -- to insist they be carefully maintained. This is no easy task.

If the local agency is run by a board, all of its members will probably not be directly involved with operations and maintenance. But everyone will frequently have to deal with complaints, and will have to request remedies from the operating and maintenance staff. As land is acquired, facilities developed, and the completed areas opened to the public, board members will find complaints increasing at a rapid rate. However, if you and your associates have done the work well, rewards in the form of widespread public satisfaction and a more attractive community will be far greater than the headaches.

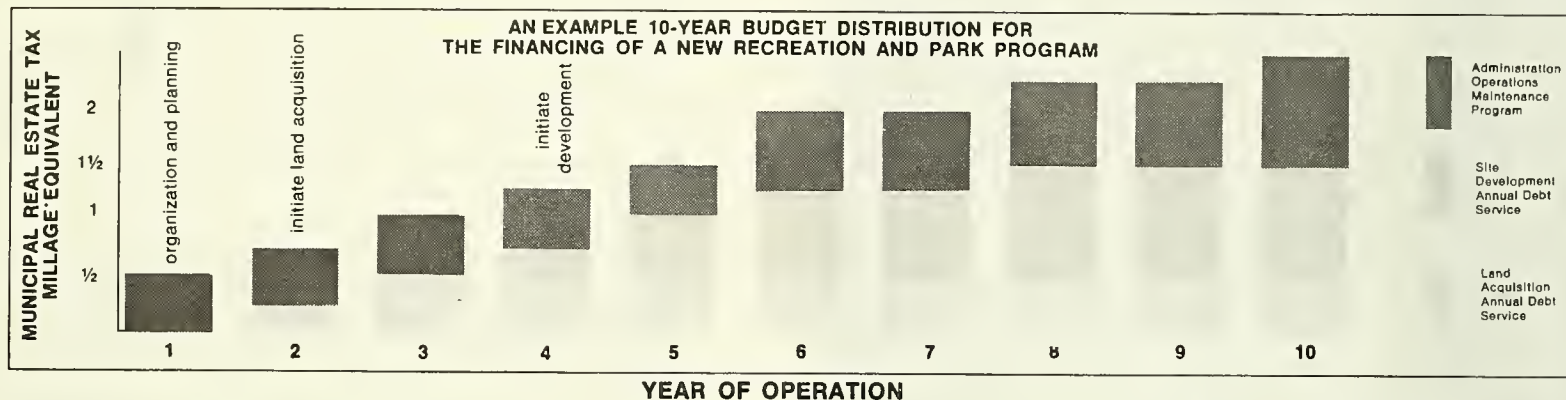
## FINANCING and BUDGETING

Financing and budgeting are perhaps the most difficult aspect of local government. The volunteer board should do its homework on these subjects and become involved in the problems of local government in order to accomplish the objectives of a recreation program.

A recreation board, when it exists, is to some degree independent of the local governing body although responsible to it, and has its own supporters. It may exercise some influence, but it must understand how to exercise this authority effectively and responsibly. Elected officials generally will go along with the members of a recreation board which is doing good things for the community and has plans to do more. But the members of the board must understand financing and budgeting as well as the political arena in order to be effective.

## Financing and Budgeting

Financing means the methods available for getting money. In general, capital funds (to buy and develop recreational property) are easier to obtain than current operating funds. Much of the capital cost can be borrowed or received from Federal or State grants. It is proper to borrow money for capital purposes, because the facilities being financed will last for many years and thus will serve the future generations who will help repay the loan. However, there are no grants available to maintain parks or pay for staff and maintenance -- and borrowing funds for current expenses is ill-advised. The community must finance current expenses out of taxes, user fees, and perhaps gifts from the public. If it cannot afford to pay the current operating expenses of recreation facilities, it cannot afford to have them. Each member of your recreation board should thoroughly understand the sources of local government income.



Source — A Guide For Local Recreation Planning, Pennsylvania Department of Community Affairs.

\*Tax Rate Per \$100.00

Budgeting is the process of planning and controlling financial operations. It includes developing estimates of proposed spending for a given period, as well as a schedule of proposed means of financing these expenditures. It involves planning or setting aside (appropriating) funds to accomplish specific objectives or programs.

The recreation agency should be aware of a special source of income: user fees. There are certain major facilities which can be programmed on a user-fee basis where admissions are charged and/or permits sold. Concessions for refreshment stands, boat rental, equipment rental, and so on can also be a source of revenue as well as reducing needs for staff and operating costs. If properly managed, these income sources can pay some, if not all, of the operating costs. Facilities like golf courses, ice rinks, major swimming pools, etc., should seek to be self-sustaining, although they may not entirely succeed. This provides more money for other operations which are free to the public, and might not otherwise be available.

Just as in the case of schools, it is considered reasonable to tax the citizens of a community for recreation facilities, even though they and their families may never use them. All public services combine to provide what might be called the "livability" of a community. This benefits the taxpayer through higher property values, attractions to new industry, lower crime rates, and a more pleasing environment. Supporters of public recreation and open space frequently make the point that when property is reserved for open space and recreation it often makes the adjoining residential property worth more than it would have been had the entire area been developed residentially.

There are two forms of budgets -- the capital budget and the current or operating budget. Since land, structures, durable equipment, and durable improvements to them are known as capital assets, money used to purchase such assets is called capital outlay or capital spending. The long-range schedule for acquiring and developing capital assets (in this case, parks and other recreation and open-space areas) is called the capital program, and the schedule for paying for these capital assets is called the capital budget. These, of course, are part of the recreation plan.

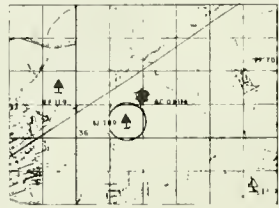
# EXAMPLE

## CAPITAL IMPROVEMENTS PROGRAM

### PROJECT SUMMARY

SIX YEAR CAPITAL IMPROVEMENT PROGRAM									
CIP ID	EP00109	DEPARTMENT AGENCY	PARKS	SUBMISSION STATUS		APPROPRIATION OF ORIGINAL			
PROJECT NAME	GLENN DALE # 2 (SPECIAL PARK AREA)								
LOCATION	TAX MAP GRID	030-804	CENSUS TRACT	004.04	SUB DRAINAGE BASIN	104	PLANNING AREA	70	
DATE FIRST IN CIP	01/70	DATE FIRST APPROPRIATED	00/00	ESTIMATED COMPLETION DATE		07/77			
PROJECT CLASSIFICATION	REPLACEMENT		PROJECT STATUS	DESIGN STAGE		LAND STATUS	SITE UNDER NEGOTIATION		
PERCENT REMAINING	88%		ESTIMATED TOTAL COST	104,900		USEFUL LIFE	999 YRS		
CIP PROJECT IMMEDIATELY PRECEDING THIS PROJECT				CIP PROJECT IMMEDIATELY FOLLOWING THIS PROJECT					
ESTIMATED PROJECT EXPENDITURES									
	1972	1973	1974	1975	1976	1977	TOTALS		
PLANNING	1	3	3	5	3	3			
LAND ACQUISITION									
CONSTRUCTION				48,170	55,300		103,470		
EQUIPMENT				3,000			3,000		
OTHER									
TOTALS				49,700	55,200		104,900		
ANTICIPATED SOURCES OF REVENUES									
	1972	1973	1974	1975	1976	1977	TOTALS		
GEN. OBL. BONDS	1	3	3	37,280	41,400	1	78,680		
REVENUE BONDS									
FEDERAL AID				12,000	13,900		25,900		
STATE AID									
DEVELOP. CONTRIB.									
SPECIAL ASSESSMENT									
OTHER									
TOTAL				49,700	55,200		104,900		
ESTIMATED ANNUAL OPERATING COST UPON COMPLETION				5	10,000				

CIP ID	EP00109
PROJECT DESCRIPTION	
<p>THIS FACILITY WILL BE A 50 ACRE PARK TO BE DEVELOPED AS A SPECIAL PARK AREA. THE PROPOSED DEVELOPMENT WILL CONSIST OF: 1) A RECREATION BUILDING, 2) ATHLETIC FIELDS, 3) TENNIS COURTS, 4) LIGHTED, UNLIGHTED, BALL COURT, 5) LIGHTED, 6) PLAYGROUND EQUIPMENT, 7) PAVEMENT, 8) DRINKING FOUNTAIN, 9) LANDSCAPING, 10) PARKING AREA AND 11) A LAKE.</p>	
PROJECT JUSTIFICATION	
<p>THIS FACILITY IS LOCATED IN A LOW TO MIDDLE INCOME AREA IN THE CENTRAL PORTION OF PLANNING AREA 70. IT IS A SINGLE-FAMILY RESIDENTIAL AREA. THIS FACILITY PROPOSED TO SERVE THE GLENN DALE HEIGHTS AND GLENN DALE COMMUNITIES. THE SITE WILL ULTIMATELY CONTAIN A 50-ACRE LAKE. THE SERVICE AREA FOR THE LAKE, WHEN COMPLETED WILL EXTEND OVER A MUCH LARGER PORTION OF THE PLANNING AREA.</p> <p>THE FACILITY APPEARED IN THE THIRD AND FOURTH YEARS OF THE APPROVED CIP BUT, BECAUSE OF DEFERMENTS OF OTHER FACILITIES, HAS BEEN DEFERRED TO THE THIRD AND FOURTH YEARS OF THE CURRENT 15-YR CIP.</p>	



To pay for these very expensive capital items, it is usually necessary to borrow. Borrowing for capital assets not only makes sense in local government, it may be the only way to bring livability to a community and to supplement the residents' investments in their homes and businesses -- much of which will have been borrowed -- with the amenities of community life. These would include school buildings, paved streets, water, sewage disposal and firefighting equipment. They should also include parks and recreation facilities.

The other aspect of budgeting is current expenses. Money to maintain and operate a recreation system and the money to put on programs is appropriated in each year's operating budget from income expected for that year. These expenses are not financed. They are the pay-as-you-go part of the local government budget. Each year the people living in the community will pay the annual cost of operation as well as helping to pay for the continuing debt service on the capital investment.

The two budgets are tied together by this debt service. While the capital improvements budget in most cases is made up for the long term, then updated as conditions change while the long-range plan is carried out, the operating budget is made up each year. It includes as an important item the annual debt service on the capital improvements -- repayment of principal and payment of interest.

Instead of asking the citizens for what might be considered a huge amount to pay for a capital improvements program on a current basis, which would in most cases spell doom for the project, the capital improvements budget merely asks the taxpayer to spread out this payment over a long period. The taxpayer will usually realize that he is helping to improve his community by putting in this facility, that he will be paying for it as long as he lives in the community, and that succeeding generations and new residents will eventually be using and paying for the facility.

One way to reduce borrowing is to build up gradually from current funds a capital reserve to acquire or replace capital assets, if this is legally permissible for local government.

If the recreation department is administered by a board, it will be the board's responsibility to prepare an annual operating budget for submission to the chief executive of the governing body. The capital budget is part of the recreation plan and should be reviewed annually as conditions change.



## CHAPTER VI

### RECREATION PROGRAMMING AND STAFFING

As the recreation system begins to take shape, the agency will find its budget and finance committee, property committee, public relations and personnel committees beginning to take active roles. The programming committee will probably be the busiest of all.

The recreation plan has included a detailed analysis of recreation needs and the areas available to meet these needs. Now comes the time for full-time professional leadership to run the day-to-day program. If such leadership does not exist already in the form of a municipal recreation department, the board will have to hire a professional director and probably additional full-time staff. Volunteers are very useful, but unless the community is quite small, it is difficult to run an effective program without trained staff.

### Analyzing Need for Staff

The staff time required, of course, depends on the number and nature of facilities being developed, and the programs for which they are being developed. The board members are aware of these facts, because they prepared a recreation plan. They know that some types of parks and playgrounds are designed for do-it-yourself programs, while others require a good deal of leadership and supervision. A tot lot, for example, requires little supervision because parents are available. But a swimming pool without supervision would be a disaster.

## Principles of Programming

A few general principles should be kept in mind for programming:

There should be a variety of programs, appealing to citizens of all ages. The particular combination of programs which a community develops depends on the age composition and size of the community, and existing natural resources. These might include: active sports, supervised games other than sports, arts and crafts, fishing, swimming, dramatics. There might also be more passive activities such as nature study, hiking, or simply strolling and enjoying the scenery. Special programs for the handicapped should be considered.

All these points should have been carefully surveyed when the recreation plan was prepared.

In staffing for a small recreation agency, keep in mind two separate functions, which may be described as follows:

- 1) Recreation supervisor - plans a well-rounded set of programs; supervises, schedules, and staffs these programs.
- 2) Park supervisor - responsible for maintenance and landscaping. Supervises and schedules work crews.

The two functions are very different, and usually cannot be combined in the same individual if the two functions are to be carried out effectively. If the budget has no room for a full-time park supervisor, the function should be handled by the municipal works department, rather than assigning it to the recreation supervisor.

## Use of Volunteers

The use of volunteers has been emphasized frequently throughout these **Guidelines** because they are essential to recreation agencies at the local level. They are helpful in a wide variety of activities -- formulating and carrying out special programs for the handicapped, leading activities of any kind, helping with maintenance and construction, providing transportation and refreshments, and campaigning for funds. Many communities have neighborhood recreation councils, as in Baltimore County, or special committees of such organizations as the Chamber of Commerce or service organizations.

The volunteer who has had a good experience participating in the recreation program is able to interpret the agency's needs to the public, and can be a powerful force.

So spend plenty of time thinking how best to use volunteers. Know exactly what jobs are best suited to volunteers. Given the responsibility, most will enjoy it, and they will spread enthusiasm to others.

Continue to meet frequently with all the groups and media representatives with whom you were in touch during the stages of preparing the plan and developing sites. You are now able to supply the press with feature stories about people and their activities in the community. It is also worthwhile to publish a small brochure listing programs available, time schedules, user fees if any, necessary registration procedures, and so on. This will make the public more familiar with the range of recreation activities available.

# CHAPTER VII

## CONSULTANTS

The need for outside consultants has frequently been mentioned in these **Guidelines**, especially where communities are too small to afford full-time professionals. Although the recreation agency will receive invaluable help from specialists at the State and perhaps the Federal level, it may need to retain its own consultants in various specialties. The State's grants-in-aid procedures require the use of professionals of various kinds. And of course outside consultants are useful for more than advice and for special work. They keep the project moving when local officials are preoccupied with other matters. Also, they can broaden the thinking of your organization by providing new ideas from other places. You know the local situation best, but the consultant has seen many other local situations. You will have to decide whether his suggestions are suited to your case.

### How to Select Consultants

The following procedure should be followed in selecting consultants:

- 1) Your agency should interview several possible candidates for a specific consulting role. During the interview, the consultant should establish his qualifications and in general describe the work he proposes to do.
- 2) The agency asks one or more consultants to submit a written proposal, based on a written project description which the agency prepares. Competition is a good process.
- 3) Consultants make a personal presentation before the agency as to the work they propose to do.
- 4) The agency chooses one of the consultants, and informs the others of its decision.

Avoid selecting a consultant solely on the basis of fees. It is far more important to get the best qualified available consultant, rather than the one with the lowest fee. Selection should be based on the best product at the lowest comparable price.

# Compensating Consultants

The agency should have a written contract, perhaps more than one depending on the method or methods used to pay the consultant. He will usually draft a contract with the agreed scope and fee schedule and submit it to the agency for review by its attorney. The local governing body or the chief executive will usually be the party to the contract, not the recreation agency. The agency should designate one staff member to work directly with the consultant, and the consultant should also name an individual in his firm. This is essential for a proper working relationship.

The basic elements for the contract are:

- 1) Description and addresses of the parties
- 2) Scope of consultants' assignment
- 3) Provision for additional services
- 4) Client's responsibilities
- 5) Period of service
- 6) Payment method and schedule
- 7) Ownership of documents created during the work
- 8) Insurance

The method of selecting a consultant and the method of paying for their services should be the responsibility of the local governing body; your municipal laws, rules and regulations should be the guiding factor. Although five basic alternatives shown below exist for compensating consultants, your municipality may favor another method.

**Lump Sum** - Often used when it is possible to define precisely the magnitude of the assignment and amount of consulting services to be performed. The general method for arriving at a figure under the lump sum method is to estimate the individual elements of the fee, plus a reasonable margin of profit.

**Payroll Costs Times a Multiplier** - Often used when the scope of the work cannot be defined at the time the consultant is hired. It is actually a form of cost-plus.

Payroll costs include salaries and wages paid to principals and staff directly engaged on the project, including but not limited to professionals, technicians, field personnel, stenographers, and clerks, plus cost of fringe benefits. The multiplier normally ranges between 2.0 and 3.0, as generally recommended by the profession. To this is added expenses of transportation and subsistence of principals and staff when traveling in connection with the project, fees of other consultants retained by the prime consultant, field office expenses, toll telephone calls, reproduction of reports, drawings and specifications and similar identifiable costs related directly to the project.

**Per Diem** - Applies to situations where services are needed for a short time or intermittently over a longer period. It is most relevant when services are primarily confined to advice, reports, investigations, court testimony and similar activities in which little or no design, detailed drafting or such services are required. Each principal and staff member on the project will be assigned a specific per diem figure. Incidental expenses such as travel and subsistence are added on.

**Cost Plus Fixed Fee** - Is similar to payroll times a multiplier. "Cost" means payroll, overhead, and reimbursable expenses. To this figure is added a fixed fee for the consultant's service and profit.

**Retainer** - A fee for having the consultant available when needed. He may possibly be required to attend the client's monthly meeting. The agreement should spell out exactly what is expected and not expected for the retainer fee, and what additional services will be supplied under other compensation methods.

There may be a combination of methods of compensation, depending on the particular circumstances.



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Prince George's County, Maryland

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*Author: Maryland Department of State Planning in cooperation with  
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Plan" and "Action Plan."*

*Practical guidelines are set forth in this publication to help  
Maryland turn its Plan into reality. These guidelines are working  
tools for the local government official, elected or appointed, and  
for the volunteer who finds himself responsible for the parks and  
recreation needs of his county or municipality.*

## NOTES

**PHOTOGRAPHS - Courtesy of:**

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